



Freedom of Information Act

FOIAonline Part 2



DNS-36 CNO FOIA

Current as of 10 July 2015



Objectives

- ✓ Processing FOIA Requests
 - ✓ Uploading Responsive Documents
 - ✓ Generating an Invoice
 - ✓ Closing out a FOIA Request
- ✓ Using the Search Function
- ✓ Using the Reports Function
- ✓ Configuring Profile Settings
 - ✓ Administration Settings
 - ✓ Individual Account Settings
- ✓ NEVER Use -Export Request Function



FOIAonline – Round 2



(We hope you have better redaction methods!)



Processing FOIA Requests

You've reviewed responsive documents and applied appropriate redactions (manually, Redax, or Adobe Pro). Now, its time to upload them to FOIAonline...

- A case *must* be assigned to a specific caseworker to use this function.
- Responsive Records can be uploaded with the following release types:
 - a) UU – **Unredacted Unreleasable**
 - b) RU – **Redacted Unreleasable**
 - c) UR – **Unredacted Releasable**
 - d) RR – **Redacted Releasable**
 - e) REQ – **Release to Requester Only**



Uploading Responsive Documents

* **Attention:** Verify the files that you intend to upload before including them in the casefile.

The sidebar menu on the FOIAonline Home page includes the following options: Home, My Cases, Unassigned Cases, Assigned Cases, Request Details, Make Assignment, Estimate Costs, Stop the Clock, Extend Due Date, Create Task, Upload Responsive Records (highlighted with a red arrow), Create Correspondence, and Create Comment.

The 'Upload Responsive Records' form contains the following fields and buttons:

- Tracking Number: DON-NAVY-2015-007331
- Submitted Date: 07/08/2015
- Requester: [Text Field]
- Perfected Date: 07/08/2015
- Organization: [Text Field]
- Last Assigned Date: 07/08/2015
- Requester Has Account: No
- Fee Limit: \$25.00
- Upload Responsive Records** (Section Header)
- The Release Type can be modified after uploading but must be perfect. Records should be uploaded in batches with identical release type.*
- If you are having problems, or do not see the "Select Files" button, switch to the basic uploader.*
- SELECT FILES** (Button)
- ADD WITHOUT FILE UPLOAD** (Button)
- No records have been uploaded.
- * Release Type: Select Release Type (Dropdown Menu)
- Keywords: [Text Field]
- SAVE CHANGES** (Button)
- CANCEL** (Button)

Upload responsive records from your computer.

Useful to account for classified responsive records.

Release type can be modified after initial upload.

Keywords are used to aide members of the public who are browsing FOIA requests.



Responsive Documents

“So...my next question is, ‘Who can see the responsive documents in FOIAonline?’”

Type of Responsive Document	Requester	Requester & Public after Closure	Internal Only
Redacted Releasable - RR		X	
Redacted Unreleasable - UR			X
Unredacted Releasable - UR		X	
Unredacted Unreleasable - UU			X
* Release to Requester Only - REQ	X		

* A requester must have an account to view the REQ files in FOIAonline. Otherwise, files must be sent to the requester via email, fax, USPS, etc.



Case Responsive Records

Responsive Record End-Result:

Records

Consultations

Correspondence

Appeals

Financing

Restricted Materials

Case Responsive Records

Publish Options : UU - Unredacted - Unreleasable
RU - Redacted - Unreleasable
UR - Unredacted - Releasable to the General Public

RR - Redacted - Releasable to the General Public
REQ - Release to Requester Only

Filter by Title or Keyword(s) :










SUBMIT

CLEAR

Results 50

Filter by Release Type : --

3 items found, displaying all items.

Publish	Title	Type	Exempt	Retention	Action	Detail
RR <input type="button" value="v"/>	2015-001297 Responsive Docs (Nav...	PDF	Ex. 6;	6 year	 	
UR <input type="button" value="v"/>	2015-001297 Responsive Docs (Con...	PDF	N/A	6 year	 	
UR <input type="button" value="v"/>	2015-010267 List of Responsive D...	PDF	N/A	6 year	 	

3 items found, displaying all items.

SAVE CHANGES

Select the pencil icon to identify applicable exemptions.

Responsive Records in Partial and Full Denials must be retained for 6 years.



Pop Quiz!

- ☐ How long must responsive records be maintained by an organization?
 - a) 2 years
 - b) 6 years
 - c) It depends
 - d) Are you kidding me? I get rid of my FOIA doc's ASAP!
(to forget the agony of having to process those *pesky* requests)
- ☐ **Answer: C** – Full Grant records must be kept for 2 years; Partial and Full Denial records must be kept for 6 years.



Generating an Invoice

- Left-clicking the “Generate Invoice” button will create a PDF file displaying total fees that are based on the Admin Costs accumulated in FOIAonline.

Create Consultation

Create Referral

Create Appeal

Interim Release

Transfer Request

Export Request

Begin Close Out Process

Generate Invoice

Print Case File

FOIA Invoice		
Department of the Navy Department of the Navy Chief Information Office 1000 Navy Pentagon Washington, DC 20350		
Mail Payment to		FOIA Tracking Number DON-NAVY-2015-007331
		Invoice Date 07/10/2015
Requester Contact Information [Redacted]		Description of Records Requested Request copies of all records that mention my name, [Redacted] (aka [Redacted]) held by the Department of the Navy.
Request Received	Date 07/08/2015	By Chief of Naval Operations
Request Fulfilled by Agency	Date 07/10/2015	By [Redacted]
Comments/Instructions		
Request Fee Category Media/Educational		
Description of Costs	Quantity	Amount (USD)
Costs Sub-total		\$0.00
AMOUNT DUE		\$0.00



Generating an Invoice

- Return to the Request Details section of the case file.
- Select the “Financing Tab” to view the invoice.



Submission Details Case File Admin Cost Assigned Tasks Comments (1) Review

Direct URL : <https://foiaonline.regulations.gov:443/foia/action/public/view/request/807e394e>

Case Details

Type of Case : FOIA
Fiscal Year : 2015
Total Days Pending : 2

Received Date : 07/08/2015
Clock Initially Started On : 07/08/2015

Records Consultations Correspondence Appeals **Financing** Restricted Materials

Invoice

Total Amount Billed Which Has Been Sent To Requester: \$0.00

Sent	Title	Invoice Date	Amount	Remove
<input type="checkbox"/>	DON-NAVY-2015-007331 Invoice 20150710.pdf	07/10/2015	\$0.00	<input type="button" value="X"/>

SAVE INVOICE CHANGES

Payments

Total Amount Owed: \$0.00

No payments to display.



*Closing out a FOIA Request **

- Closing a request is a three-part process:
 - 1) Apply a Disposition
 - 2) Perform the Case File Review **
 - 3) Send the Final Disposition Notice
- * If a case is not assigned to an individual caseworker, then the closeout process cannot commence.
- ** Some commands are configured so that no review is required. In that case, the second step will not be performed.



Selecting a Final Disposition

Create Consultation

Create Referral

Create Appeal

Interim Release

Transfer Request

Export Request

Begin Close Out Process

Generate Invoice

Print Case File

Final Disposition

* Disposition:

Letter Template: **Select Letter Template**

Responsive Records

No responsive records have been uploaded.

Exemptions Used

No exemptions have been applied to any records.

Invoice Comments/Instructions

0/500

BEGIN CLOSE OUT **CANCEL**

Select Letter Template and edit as necessary.

- Upon beginning the closeout process, this letter will be saved as a PDF in “Other Correspondence.”
- A **“Full Grant”** disposition will require at least one record uploaded with no associated exemptions or exclusions.
- A **“Partial Grant / Partial Denial”** will require at least applied exemption and at least one record publishable.
- A **“Full Denial”** requires no publishable records to be uploaded.



Performing Case Review

- The review process allows a supervisory FOIA official to review a case file before the final response letter is sent to a requester.
- If a review is required according to agency settings, the closeout process cannot begin until a reviewer is selected.

The screenshot displays a web interface for reviewing a FOIA case. At the top, a light blue box contains the text "Select the Review tab to assign a reviewer." with a red arrow pointing to the "Review" tab in the navigation bar. The main content area shows case details: Tracking Number (DON-NAVY-2015-007331), Submitted Date (07/08/2015), Requester (redacted), Perfected Date (07/08/2015), Organization (redacted), Last Assigned Date (07/08/2015), Requester Has Account (No), and Fee Limit (\$25.00). Below this is a navigation bar with tabs: Submission Details, Case File, Admin Cost, Assigned Tasks, Comments (1), and Review. The "Review" tab is highlighted. Under the "Assigned Reviewers" section, it states "No reviewers have been assigned." and includes a green "ADD REVIEWER" button. A light blue box with the text "Once the Close Out Process is commenced, a task is sent to the reviewer" is positioned to the right of the "Assigned Reviewers" section.

Tracking Number : DON-NAVY-2015-007331 Submitted Date : 07/08/2015

Requester : [Redacted] Perfected Date : 07/08/2015

Organization : [Redacted] Last Assigned Date : 07/08/2015

Requester Has Account : No Fee Limit : \$25.00

Submission Details Case File Admin Cost Assigned Tasks Comments (1) **Review**

Assigned Reviewers

No reviewers have been assigned.

ADD REVIEWER

Once the Close Out Process is commenced, a task is sent to the reviewer



Conducting a Review

- The reviewing official will receive an automatic email from FOIAonline notifying them that a task has been assigned to them. The task can be found in “*My Cases.*”

Critical Areas to Review:

- 1) Disposition Type
- 2) Responsive Records
- 3) Correspondence
- 4) Complete Case File

Approve the review if the casefile is complete and the letter and records are correct.

The screenshot displays the FOIAonline task review interface. It features a sidebar on the left with 'Task Details' and 'Edit or Close Out Task' buttons. The main content area is divided into three sections: 'Request Details', 'Task Details', and 'Case File Review'. The 'Request Details' section shows tracking information for DON-NAVY-2014-006714, submitted on 06/11/2014, with a fee limit of \$25.00. The 'Task Details' section shows the task type as 'Case File Review', due on 05/29/2015, and assigned to a user. The 'Case File Review' section includes a 'Comments' field with a text box and a character count of 0/2000. A blue callout box over the comments field says 'Add explanatory comments to the case worker.' At the bottom, there are three buttons: 'SAVE', 'APPROVE', and 'REJECT'.

Request Details	
Tracking Number : DON-NAVY-2014-006714	Submitted Date : 06/11/2014
Requester : [redacted]	Perfected Date : 08/20/2014
Organization : N/A	Last Assigned Date : 08/20/2014
Requester Has Account : No	Fee Limit : \$25.00

Task Details	
Task Type : Case File Review	Assigned To : [redacted]
Due Date : 05/29/2015	Last Assigned Date : 05/29/2015
Task Submitted Date : 05/29/2015	Last Assigned By : [redacted]
Description : Case File Review	
Comments :	

Case File Review	
Comments :	0/2000

SAVE APPROVE REJECT

Reject the review if the case requires rework or correction.



Sending a Final Disposition Notice

After a favorable review, the caseworker will receive a ***“Close Out”*** Task which can be found in ***“My Cases”***

- 1) Select “Close Out Task”
- 2) Choose offline closure date (if backdating)
- 3) Close case without sending final notice (if sent by other means).
- 4) Edit Subject and Body of notice.
 - It may be appropriate to acknowledge files that are being sent to the requester as well as applicable fees.
 - You may also simply refer them to enclosed official correspondence.



Sending a Final Disposition Notice

After amending the Final Disposition Notice, perform the following:

- 1) Upload Supporting Files *
(optional)
- 2) Attach the latest invoice
(especially if there are billable fees).
- 3) Attach applicable correspondence to requester.
 - This could include an official letterhead response
- 4) Attach responsive records.
(Now is a great time to conduct another review of releasable records – for good measure)

* These only include files sent by requesters.

Final Disposition Notice

From :

To :

* Subject : Final Disposition, Request DON-NAVY-2015-001925

* Body :

B **I** **U**

Font Size

DON-NAVY-2015-001925 has been processed with the following final disposition: All records referred to another agency.

Attach Supporting Files

If you are having problems, or do not see the "Select Files" button, switch to the basic uploader.

SELECT FILES

1

No attachments have been added.

Attach Latest Invoice?

*

Attach to Send?	Title	Amount
<input checked="" type="checkbox"/>	DON-NAVY-2015-001925 Invoice 20150601.pdf	\$0.00

2

Attach Records or Past Correspondence

Filter All Results 501

2 items found, displaying all items.

Send?	Title	Type	Record Release Type
<div>Select</div>	2015-001925 Admin Log ().pdf	Correspondence	
<div>Select</div>	2015-001925 C10F Resp to Req ().pdf	Correspondence	

3 4

2 items found, displaying all items.

16



Pop Quiz!

- ☐ Which of the following is arguably **NOT** a *good* time to check to ensure you're including the correct responsive documents?
 - a) Before I upload them to the case file.
 - b) After I've uploaded them to the case file.
 - c) During the case close out process.
 - d) After the final disposition notice has been sent to the requester along with responsive documents.
- ☐ **Answer: D – Yep, it's now officially too late. (I hope you included the correct, redacted records!)**



Referrals and Consultations

“But wait...you haven’t really talked about referrals and consultations?”

- Referrals and consultations are processed in the system in a manner similar to FOIA requests.
- Please refer to the FOIA processing handout for step-by-step instructions on how to process them in FOIAonline.



Using the Search Function

- The “Search” function enables the user to conduct an advanced search for specific that the simple search window (in the upper right corner of the home screen) →
- The advanced search includes:
 - a) Requests
 - b) Appeals
 - c) Full-Text Records
 - d) Consultations
 - e) Referrals.
- Closed cases can only be searched for using the advanced “Search” function.





Using the Search Function

- Select the “Search” tab at the top of the web page.
- Toggle search criteria to locate specific cases.

The screenshot shows a web application interface for searching FOIA requests. At the top, there is a navigation bar with tabs: Home, Search, Reports, Administration, and My Account. A red arrow points to the Search tab. To the right of the tabs is a search input field labeled "Search FOIA requests...". Below the navigation bar, the main content area is titled "Search". It contains a paragraph explaining search rules: "When multiple search terms are entered an OR search is performed. To search for a phrase, place the search terms in quotations \"\". To find a request by tracking number, enter the entire number (EPA-2012-000123), a partial number (000123), or by using a wildcard (*123). To search for all items in a given fiscal year, enter the year (2012)." Below this is a "Search Criteria" section. It includes a search input field with a magnifying glass icon and a "For:" label. There are three columns of checkboxes: "Type" (Request, Appeal, Record (Full-Text), Consultation, Referral), "Track" (Simple, Complex, Expedited, TBD), and "Overdue?", "Open?", "On Hold?" (each with a dropdown arrow). There is a "Status:" dropdown menu with options: Submitted, Initial Evaluation, Assignment Determination, and Estimate Costs. At the bottom, there is a "Agency:" section with a radio button for "My Agency (DON and below)" and a radio button for "Other Agencies (everything outside of DON)". Below the "Other Agencies" radio button is a list of agencies: U.S. Department of Commerce, Federal Communications Commission, General Services Administration, and U.S. Small Business Administration. At the bottom of the page, there are two buttons: "SEARCH" and "CLEAR SEARCH FIELDS".

Home Search Reports Administration My Account Search FOIA requests...

My Cases

- Unassigned Cases
- Assigned Cases

New Request

- New Consultation
- New Referral

Search

When multiple search terms are entered an OR search is performed. To search for a phrase, place the search terms in quotations "". To find a request by tracking number, enter the entire number (EPA-2012-000123), a partial number (000123), or by using a wildcard (*123). To search for all items in a given fiscal year, enter the year (2012).

Search Criteria

* Search For :

* Type : ☒ Request ☒ Appeal ☒ Record (Full-Text) ☒ Consultation ☒ Referral

* Track : ☒ Simple ☒ Complex ☒ Expedited ☒ TBD

Overdue? : ☐ ☐

Open? : ☐ ☐

On Hold? : ☐ ☐

Status : Submitted Initial Evaluation Assignment Determination Estimate Costs

* Agency : ☒ My Agency (DON and below) ☐ Other Agencies (everything outside of DON)

U.S. Department of Commerce
Federal Communications Commission
General Services Administration
U.S. Small Business Administration

SEARCH CLEAR SEARCH FIELDS



Using the Reports Function

Agency Reports include the following:

- **Annual Report:** These reports are also public facing and contain real-time updates regarding request, referral, appeal and consultation metrics. The reports are identical to those produced in the year-end annual report.
- **Year-End Annual Report:** The year-end annual report is generated after the fiscal year has ended and all request processing has been completed.

***** Once the data entered into FOIAonline is guaranteed to be accurate, this function could take the place of traditional feeder reports (DD2564) *****

- **Backlog Report:** Produces a list of all requests that are flagged as backlogged. (*very useful for commands that receive many requests*)
- **Workload Report:** Produces a breakdown of the requests, appeals, referrals, consultations, and tasks assigned to users at the user's level and for individuals below them.
- **Record Retention Report:** Monitors the retention periods of released records and allows privileged users to extend the retention period or remove expired records.



Using the Reports Function

Agency Reports include the following (continued):

Round up
your tasks
with this
report.

- **Expedited Processing Report:** Produces a report of all requests and referrals which have expedited processing tasks.
- **Fee Waiver Report:** Produces a report of all requests and referrals which have fee waiver tasks.
- **Overdue Cases Report:** Produces a list of all requests, referrals, and appeals which are overdue.
- **Delinquency Report:** Produces a list of all requesters who have outstanding fee payments for 30, 60, or 90 days.

*** Very useful for commands who likely have delinquent commercial requesters ***

- **Custom Report:** A powerful report which can be used to specify a variety of input criteria.

The most-used
report at DNS-36



Using the Reports Function

- Select the “Reports” Tab at the top of the webpage.
- Choose the report you wish to perform.
- All reports have the ability to be converted to Excel or csv format.



The screenshot shows a web application interface with a top navigation bar containing tabs: Home, Search, Reports, Administration, and My Account. A red arrow points to the 'Reports' tab. To the right of the tabs is a search bar labeled 'Search FOIA requests...'. Below the navigation bar, the 'Reports' section is titled 'Agency Reports'. On the left side of this section is a vertical list of report types: Annual Report, Year-End Annual Report, Backlog Report, Workload Report, Retention Report, Expedited Processing Report, Fee Waiver Report, Overdue Cases Report, Delinquency Report, and Custom Report. On the right side, there is a detailed list of these reports with their descriptions:

- Annual Report: These reports are also public facing and contain real-time updates regarding request, referral, appeal and consultation metrics. The reports are identical to those produced in the year-end annual report.
- Year-End Annual Report: The year-end annual report is generated after the fiscal year has ended and all request processing has been completed. The year-end annual report is generated from the backend and populates within a table, including an editable version of the report. The editable version of the report uses individual tables to allow modification of system data and input of data not captured by the system.
- Audit Log Report: A per request list of the actions taken, including the fields that have been updated for each action.
- Backlog Report: Produces a list of all requests that are flagged as backlogged.
- Workload Report: Produces a breakdown of the requests, appeals, referrals, consultations, and tasks assigned to users at the user's level and for individuals below them.
- Record Retention Report: Monitors the retention periods of released records and allows privileged users to extend the retention period or remove expired records.
- Expedited Processing Report: Produces a report of all requests and referrals which have expedited processing tasks.
- Fee Waiver Report: Produces a report of all requests and referrals which have fee waiver tasks.
- Overdue Cases Report: Produces a list of all requests, referrals, and appeals which are overdue.
- Delinquency Report: Produces a list of all requesters who have outstanding fee payments for 30, 60, or 90 days.
- Custom Report: A powerful report which can be used to specify a variety of input criteria.



Pop Quiz!

- ❑ Which report could be especially useful to commands who receive requests from commercial requesters who submit complex, labor-intensive requests?

- ❑ **Answer: Delinquency Report** – It produces a list of all requesters who have outstanding fee payments for 30, 60, or 90 days.



Configuring Profile Settings

- To change your component and subcomponents' settings, select the "Administration" Tab.

The screenshot shows the "Administration" tab selected in the top navigation bar. The left sidebar contains a list of sub-agency commands: NAVY, CLGWP, ASNMRA, BCNR, CFFC, BUMED, CIDUCS, CNATTHQ, CNIC, and CNRF. The main content area is titled "Sub-Agency Details" and has three sub-tabs: "Details", "Configuration", and "Letters". The "Configuration" sub-tab is active, showing "Sub-Agency Information" for the "NAVY" command. The information includes fields for Agency Name, Agency Acronym, Display Label, FOIA Officer, Mailing Address Line 1 and 2, City, State/Province, Zip Code/Postal Code, Phone Number, Fax Number, and Notification Email Address. The "Notification Email Address" field is highlighted with a red arrow pointing to a callout box.

Home Search Reports Administration My Account Search FOIA requests...

Agency Administration
Agency User Administration

NAVY

CLGWP
ASNMRA
BCNR
CFFC
BUMED
CIDUCS
CNATTHQ
CNIC
CNRF

Sub-Agency Details

Details Configuration Letters

Sub-Agency Information

★ Agency Name : Chief of Naval Operations
Agency Acronym : NAVY
Display Label : United States Navy
★ FOIA Officer : Robin Patterson
★ Mailing Address Line 1 : 2000 Navy Pentagon
Mailing Address Line 2 :
★ City : Washington
★ State/Province : DC
★ Zip Code/Postal Code : 20350-2000
Phone Number : 202-685-6545
Fax Number : 202-685-6577
Notification Email Address : DONFOIA-PA@navy.mil

SAVE CHANGES CANCEL

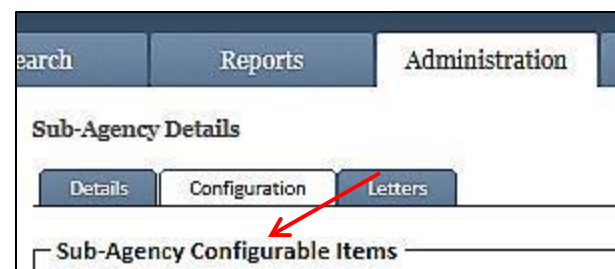
All subordinate commands ("sub components")

This email address receives new case assignment notifications.



Configuring Profile Settings

- To reconfigure your command's FOIAonline settings, select the “**Configuration**” Tab on the “**Administration**” page.



- Configurable Items:
 - Agency Invoices
 - Records Retention
 - Reviewer Settings
 - Remittance Contact Information



Configuring Profile Settings

To create or amend letter templates, select the “**Letters**” Tab.

- You may create new letters for use in various stages of FOIA request processing.
- Letter templates can save time while ensuring correspondence standardization.

**** Attention ****

Use discretion when using template letters. Sometimes, official letterhead correspondence is more appropriate.

The screenshot shows the 'Sub-Agency Details' configuration page with the 'Letters' tab selected. A red arrow points to the 'Letters' tab. The page is divided into two main sections: 'Existing Letters' and 'New Letter'.

Existing Letters

Letter Name	Letter Description	Action	Detail
Estimate Cost Notice			
Final Disposition Notice			
Interim Release Notice			
New Tracking Number			

New Letter

★ Letter Name :

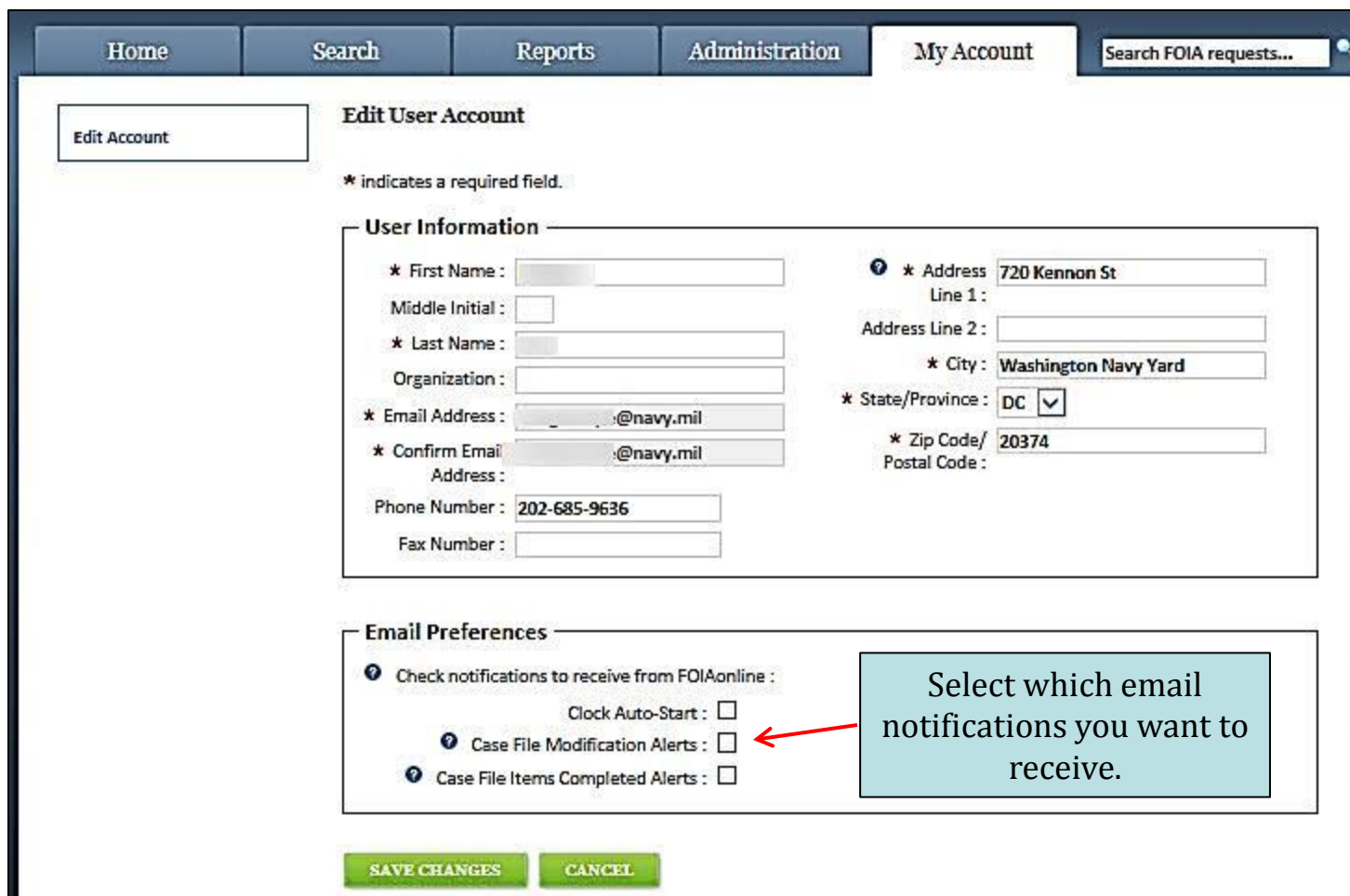
Letter Description :

Formatting toolbar: Placeholders



Configuring Profile Settings

To adjust your own account settings, select the “My Account” tab.



The screenshot shows a web application interface with a navigation bar at the top containing tabs: Home, Search, Reports, Administration, and My Account. A red arrow points to the 'My Account' tab. Below the navigation bar is a search box labeled 'Search FOIA requests...'. The main content area is titled 'Edit User Account' and includes a sub-section 'Edit Account' on the left. The form contains two main sections: 'User Information' and 'Email Preferences'. The 'User Information' section includes fields for First Name, Middle Initial, Last Name, Organization, Email Address, Confirm Email Address, Phone Number, and Fax Number. The 'Email Preferences' section includes a checkbox for 'Check notifications to receive from FOIAonline' and three checkboxes for 'Clock Auto-Start', 'Case File Modification Alerts', and 'Case File Items Completed Alerts'. A red arrow points to the 'Case File Modification Alerts' checkbox. A blue callout box with the text 'Select which email notifications you want to receive.' is positioned next to the 'Email Preferences' section. At the bottom of the form are two buttons: 'SAVE CHANGES' and 'CANCEL'.

Home Search Reports Administration **My Account** Search FOIA requests...

Edit Account

Edit User Account

* indicates a required field.

User Information

* First Name :
Middle Initial :
* Last Name :
Organization :
* Email Address : @navy.mil
* Confirm Email Address : @navy.mil
Phone Number : 202-685-9636
Fax Number :

* Address 720 Kennon St
Line 1 :
Address Line 2 :
* City : Washington Navy Yard
* State/Province : DC
* Zip Code/Postal Code : 20374

Email Preferences

* Check notifications to receive from FOIAonline :
Clock Auto-Start : ☐
* Case File Modification Alerts : ☐
* Case File Items Completed Alerts : ☐

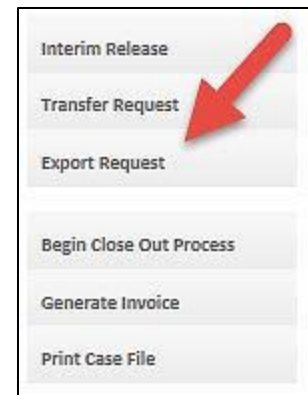
Select which email notifications you want to receive.

SAVE CHANGES CANCEL



Export Request Function

“What is the mysterious “Export Request” Function?”



- Exporting a Request deletes it from the system.
- There are two instances in which you might use this function:
 - 1) To delete a pure **Privacy Act** Request received in FOIAonline.
(Communicate this with the requester and process it separately).
 - 2) To delete practice or “test” FOIA requests – a great way to better understand the tool.
- When you export a request, you receive an email receipt that contains comprehensive information regarding the request including metadata.

*** This should NOT be used as a “convenient” backlog reduction method! ***



FOIAonline Demonstration

FOIAonline Demonstration Interface:

Header: Welcome, [User] [SIGN OFF](#) [Print Page](#)

Navigation: Glossary, FAQs, Resources, About

FOIAonline Logo: [Icon of a classical building]

Main Menu: Home, Search, Reports, Administration, My Account

Search Bar: Search FOIA requests...

Left Sidebar (My Cases):

- My Cases
- Unassigned Cases
- Assigned Cases
- New Request
- New Consultation
- New Referral

Notice: FOIAonline will undergo infrastructure maintenance and be unavailable from 12pm (ET) through 6pm (ET), Saturday, July 11.

Welcome to the FOIAonline Agency Portal.

The Agency Portal allows users to view requests created by the public and create requests which were received outside the system. Access existing requests through the My Cases, Unassigned Cases, or Assigned Cases dashboards to the left of the page, or the "Search FOIA requests..." box in the upper-right corner. Likewise, requests, consultations (from a non-participating agency), and referrals (from a non-participating agency) can be created using the corresponding actions to the left of the page.

Footer:

Help Desk (8:00 am - 6:00 pm ET, M-F) | Toll-Free: (844) 238-7744 | Local: (970) 494-5506 | [Email Support](#)
[Privacy and Security Notice](#) | [Accessibility Statement](#)

FOIAonline



Common Pitfalls

- Failure to accurately record administrative costs.
- Failure to assess and track appropriate fees.
- Selecting the incorrect Final Disposition.
- Uploading the incorrect correspondence or responsive documents.
- Failure to enter into the system any requests, referrals, and consultations received from a method other than FOIAonline.
- Failure to completely close a case, by not executing the **final “Close Out” task**.
- Closing a case without building a complete electronic file (processing notes, emails, memos)



Saved Rounds

Got Questions??